

REQUEST FOR PROPOSALS

Alternative and Renewable Fuel and Vehicle Technology Program Outreach and Marketing Campaign



RFP #600-11-601
www.energy.state.ca.gov/contracts
State of California
California Energy Commission
March 2012

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- 2 Darfur Contracting Act
- 3.1 Certified Small/micro Business, Non-small Business and
DVBE Certification Instructions
- 3.2 Disabled Veteran Business Enterprise Program Requirements
- 3.3 DVBE Std. 843
- 3.4 Bidder Declaration form GSPD-05-105
- 4 Contractor Certification Clauses
- 5 Client References
- 6 Sample Standard Agreement
- 7 Budget Forms
- 8 Bidder Certification of Minimum Qualifications

I. Introduction

BACKGROUND

Assembly Bill 118 (Núñez, Chapter 750, Statutes of 2007) created the Alternative and Renewable Fuel and Vehicle Technology Program (Program). The statute, subsequently amended by AB 109 (Núñez, Chapter 313, Statutes of 2008), authorizes the California Energy Commission to fund projects for the development and deployment of innovative transportation technologies to transform California's transportation market to one comprised of a diverse portfolio of alternative fuels and advanced vehicles that reduce California's greenhouse gas emissions and dependence on petroleum.

The California Energy Commission must prepare and adopt an annual update to the investment plan for the Program to determine the funding priorities and opportunities to be supported in the coming year and to describe how program funding will be used to complement other public and private investments.

PURPOSE OF RFP

The purpose of this solicitation is to obtain proposals from full-service advertising and social marketing agencies to develop and execute a comprehensive outreach and marketing campaign to advance the transition of the transportation fuels market to non-petroleum, lower carbon, clean alternative fuels and advanced vehicle technologies. The Alternative and Renewable Fuels and Vehicle Technology Program (Program) is seeking a contractor that can offer its relevant experience, strategies, and activities/campaigns to expand the market for alternative fuels and advanced vehicle technologies in California.

The outreach and marketing contract resulting from this solicitation will represent the initial launch of a professionally developed campaign to assist the Program in achieving its mission. As such, the Energy Commission seeks the services of a generalist advertising and social marketing firm that possesses the experience, creativity, and talent required to develop and implement a comprehensive research-based campaign that is responsive to the diverse and evolving advanced transportation market.

While it may prove beneficial if a bidder has experience in marketing alternative fuels and advanced vehicle technologies, experience is not required.

KEY ACTIVITIES AND DATES

Key activities including dates and times for this RFP are presented below. An addendum will be released if the dates change for the asterisked (*) activities.

ACTIVITY	ACTION DATE
RFP Release	March 7, 2012
Deadline for Written Questions*	March 21, 2012
Distribute Questions/Answers and Addenda (if any) to RFP	March 28, 2012
Deadline to Submit Proposals by 3:00 p.m.*	April 18, 2012
Notice of Proposed Award	April 27, 2012
Commission Business Meeting	June 13, 2012
Contract Start Date	June 30, 2012
Contract Termination Date	June 30, 2014

AVAILABLE FUNDING AND HOW AWARD IS DETERMINED

There is \$2,210,000 available for the contract resulting from this RFP. The awarded contract will be an hourly rate plus cost reimbursement contract and the award will be made to the responsible Bidder receiving the highest points. The rates represented in the proposal will not be renegotiated during contract development.

The Energy Commission reserves the right to reduce the contract amount to an amount deemed appropriate in the event the budgeted funds do not provide full funding of Energy Commission contracts. In this event, the Contractor and Commission Contract Manager (CCM) shall meet and reach agreement on a reduced scope of work commensurate with the level of available funding.

ELIGIBLE BIDDERS

This solicitation is restricted to private entities, including non-profit organizations and private universities, and any public entity that can meet the requirements of this solicitation (e.g., Disabled Veteran Business Enterprise participation) and agree to the attached terms and conditions that will be included in the resulting agreement(s). Even if public entities cannot meet these requirements or agree to the terms, they can still participate as subcontractors.

The reason for this distinction is that the Department of General Services, which has oversight of state contracting, no longer allows the Energy Commission to include different terms and conditions within the same solicitation. The Energy Commission used to do this because some public entities cannot agree to the same terms and conditions that apply to private entities. Every entity that bids under this solicitation must meet the solicitations requirements and must agree to the terms and conditions included. The Energy Commission will not award contracts to non-complying entities.

QUESTIONS

During the RFP process, questions of clarification about this RFP must be directed to the Contracts Officer listed in the following section. You may submit written questions via mail, electronic mail, and by FAX. However, all questions must be received by 5:00 pm on the day listed in the Key Activities and Dates table above.

Question and answer sets will be emailed to all parties who submitted written questions. The questions and answers will also be posted on the Commission's website at:

<http://www.energy.ca.gov/contracts/index.html>.

Any verbal communication with a Commission employee concerning this RFP is not binding on the State and shall in no way alter a specification, term, or condition of the RFP. Therefore, all communication should be directed in writing to the Energy Commission's Contract Officer assigned to the RFP.

CONTACT INFORMATION

Coco Worthy, Contracts Officer
California Energy Commission
1516 Ninth Street, MS-18
Sacramento, California 95814
Telephone: (916) 654-5833
FAX: (916) 654-4423
E-mail: cworthy@energy.ca.gov

RESPONSES TO THIS RFP

Responses to this solicitation shall be in the form of an Administrative, Technical and Cost Proposal according to the format described in this RFP. The Administrative response shall include all required administrative documents. The Technical Proposal shall document the Bidder's approach, experience, qualifications, and project organization to perform the tasks described in the Scope of Work, and the Cost Proposal shall detail the Bidder's budget to perform such tasks.

REFERENCE DOCUMENTS

Bidders responding to this RFP may want to familiarize themselves with the following links to Alternative and Renewable Fuel and Vehicle Technology Program foundational documents:

- Fiscal Year 2012/2013 Investment Plan Update, Staff Draft
<http://www.energy.ca.gov/2012publications/CEC-600-2012-001/CEC-600-2012-001-SD.pdf>
- Fiscal Year 2011/12 Investment Plan
<http://www.energy.ca.gov/2011publications/CEC-600-2011-006/CEC-600-2011-006-CMF.pdf>
- Fiscal Year 2010-2011 Investment Plan
<http://www.energy.ca.gov/2010publications/CEC-600-2010-001/CEC-600-2010-001-CMF.PDF>
- Fiscal Year 2008-2010 Investment Plan
<http://www.energy.ca.gov/2009publications/CEC-600-2009-008/CEC-600-2009-008-CMF.PDF>
- California Health and Safety Code Sections 44270 - 44271 and 44272 – 44273
<http://www.leginfo.ca.gov/cgi-bin/waisgate?WAISdocID=33388627882+0+0+0&WALSaction=retrieve>
<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=hsc&group=44001-45000&file=44272-44273>
- California Code of Regulations, title 20, sections 3100-3108 (regulations implementing the Program)
<http://www.energy.ca.gov/2008publications/CEC-600-2008-013/CEC-600-2008-013-F.PDF>
- DRIVE: California's Alternative & Renewable Fuel & Vehicle Technology Program
<http://www.energy.ca.gov/drive/index.html>

All above reference documents are on display and available for review in the Energy Commission's Library. Library hours are Monday - Friday from 8:30 a.m. to 4:30 p.m., closed for lunch 12:00-1:00p.m. The Library is located at: California Energy Commission, 1516 Ninth Street, First Floor, Sacramento, CA 95814, (916) 654-4292.

II. Scope of Work and Deliverables

ABOUT THIS SECTION

In this section the Energy Commission provides an overview of the Alternative and Renewable Fuel and Vehicle Technology Program (Program), the Program's outreach and marketing needs, and Program goals and tasks that must be addressed through the outreach and marketing contract resulting from this RFP.

BACKGROUND

In California, the transportation sector represents roughly half of all energy consumed and is more than 90-percent dependent on petroleum. Despite the current economic turmoil, Californians still consume more than 50 million combined gallons of gasoline and diesel every day. Petroleum-fueled transportation contributes about 40 percent of the state's greenhouse gas (GHG) emissions; the largest amount of any one sector.

Through 2015, the Energy Commission has been authorized to provide funding, up to \$100 million per year, to leverage public and private investments committed to the development and deployment of alternative fuels and advanced transportation technologies. The Energy Commission is authorized to support projects that:

- Develop and produce alternative and renewable low-carbon fuels in California
- Optimize alternative and renewable fuels for existing and developing engine technologies
- Decrease, on a full fuel cycle basis, the overall impact and carbon footprint of alternative and renewable fuels and increase sustainability
- Expand fuel infrastructure, fueling stations, and equipment
- Improve light-, medium-, and heavy-duty alternative vehicle technologies.
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets.
- Expand infrastructure connected with existing fleets, public transit, and transportation corridors.
- Establish workforce training programs, conduct public education and promotion, and create technology centers.

Annual Investment Plan

The California Energy Commission must prepare and adopt an annual investment plan or update for the Alternative and Renewable Fuel and Vehicle Technology Program that establishes funding priorities and describes how Program funding will be used to complement other public and private investments. All projects funded by the Energy Commission must be consistent with the priorities established in the investment plan or update. Due to the fact that each investment plan establishes the program focus and funding priorities for the coming year, the Contractor will be expected to prepare a new or revised Outreach and Marketing Plan to remain consistent with the goals and priorities identified in each new investment plan or update.

Target Audiences

The primary audiences for the Program's outreach and marketing are fleet owners/managers and independent vehicle operators in California. These audiences have diverse transportation

needs, based on geographical location, available fueling infrastructure, need (annual vehicle miles traveled (VMT), duty-cycle, etc.), cost factors, and required vehicle weight (from light-duty vehicles to heavy-duty vehicles).

AGREEMENT GOALS

The primary goal of the Agreement is to accelerate market acceptance and adoption of alternative fuels and new clean, efficient low-carbon vehicle technologies that reduce petroleum dependence and the generation of greenhouse gas emissions.

To achieve this goal, the Contractor must develop and implement a comprehensive outreach and marketing campaign to increase awareness of the benefits of alternative fuels and vehicles from a business, economic, social, and environmental perspective. The Program's outreach and marketing effort must serve to familiarize commercial and public fleet owners/managers and independent vehicle operators with the currently available alternative fuels and advanced vehicle technologies, their optimum duty cycle, the benefits of adopting these new technologies, and the resources available to help remove or reduce barriers to adoption of alternative fuels and vehicles.

Other goals of the Agreement are to:

- Increase the target audiences' awareness of the availability and benefits of various alternative fuels and vehicle technologies for commercial, public, and private use,
- Accelerate market acceptance and adoption of advanced vehicle technologies,
- Educate fleet and commercial vehicle owners and operators about the life-cycle cost savings of alternative fuels and vehicles,
- Develop and implement a comprehensive, cost-efficient and well-leveraged outreach and marketing campaign,
- Identify, reach, and influence the Program's diverse target audiences, and
- Establish outreach and marketing partnerships with regional stakeholders or air districts to increase awareness of regionally-focused alternative fuels and efficient vehicles.

FORMAT/REPORTING REQUIREMENTS

Deliverables/Reports

When creating reports, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Contract Manager (CCM), the latest version of the Consultant Reports Style Manual published on the Energy Commission's web site:

http://www.energy.ca.gov/contracts/consultant_reports/index.html

Each final deliverable shall be delivered as one original, reproducible, 8 ½" by 11", camera-ready master in black ink. Illustrations and graphs shall be sized to fit an 8 ½" by 11" page and readable if printed in black and white.

Electronic File Format

The Contractor shall deliver an electronic copy (CD ROM or memory stick or as otherwise specified by the CCM) of the full text in a compatible version of Microsoft Word (.doc).

The following describes the accepted formats of electronic data and documents provided to the Energy Commission as contract deliverables and establishes the computer platforms, operating systems and software versions that will be required to review and approve all software deliverables.

- Data sets shall be in Microsoft (MS) Access or MS Excel file format.
- PC-based text documents shall be in MS Word file format.
- Documents intended for public distribution shall be in PDF file format, with the native file format provided as well.
- Project management documents shall be in MS Project file format.

Software Application Development

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework (version 3.5 and up) Recommend 4.0
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5
- Visual Studio.NET (version 2008 and up) Recommend 2010
- C# Programming Language with Presentation (UI), Business Object and Data Layers
- SQL (Structured Query Language)
- Microsoft SQL Server 2008, Stored Procedures Recommend 2008 R2
- Microsoft SQL Reporting Services Recommend 2008 R2
- XML (external interfaces)

Any exceptions to the Electronic File Format requirements above must be approved in writing by the Energy Commission Information Technology Services Branch.

WORK AUTHORIZATION CONTRACT

This is a "Work Authorization" Contract and no work shall be undertaken unless authorized by the Energy Commission through a specific written document called a Work Authorization (WA). Each WA shall clearly define the scope of work, the deliverables, the schedule of deliverables and a detailed budget. The Contractor shall begin work only when a written WA is signed by both the Contractor and the Energy Commission Contract Manager (CCM) and has been approved by the Department of General Services.

TASKS

TASK 1- AGREEMENT MANAGEMENT

Task 1.1 Kick-off Meeting

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

The Contractor shall:

- Attend a "kick-off" meeting with the CCM, the Contracts Officer, and a representative of the Accounting Office. The meeting will be held in Sacramento, CA and the CCM will designate the specific location. The Contractor shall include their Project Manager, Contracts Administrator, Accounting Officer, and others designated by the CCM in this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting.
- If necessary, prepare an updated Schedule of Deliverables based on the decisions made in the kick-off meeting.

The CCM shall:

- Arrange the meeting including scheduling the date and time.
- Provide an agenda to all potential meeting participants prior to the kick-off meeting.

Deliverables:

- An Updated Schedule of Deliverables (if applicable)

Task 1.2 Invoices**The Contractor shall:**

- Prepare invoices for all reimbursable expenses incurred performing work under this Agreement in compliance with the Exhibit B of the Terms and Conditions of the Agreement. Invoices shall be submitted with the same frequency as progress reports (task 1.4). Invoices must be submitted to the Energy Commission's Accounting Office.

Deliverables:

- Invoices

Task 1.3 Manage Subcontractors

The goal of this task is to ensure quality products, to enforce subcontractor Agreement provisions, and in the event of failure of the subcontractor to satisfactorily perform services, recommend solution to resolve the problem.

The Contractor shall:

- Manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Energy Commission will assign all work to the Contractor. If the Contractor decides to add new subcontractors, they shall 1) comply with the Terms and Conditions of the Agreement, and 2) notify the CCM who will follow the Energy Commission's process for adding or replacing subcontractors.

Task 1.4 Progress Reports

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement.

The Contractor shall:

- Prepare progress reports which summarize all Agreement activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due within 15 calendar days after the end of the reporting period. The CCM will provide the format for the progress reports.

Deliverables:

- Monthly Progress Reports

Task 1.5 - Annual Report

The goal of this task is to prepare a comprehensive Annual Report that describes the original purpose, approach, results and outcomes of the work performed over the preceding year under this agreement. The CCM will review and approve the Annual Report. The Annual Report must be submitted within 60 days of the end of the performance year.

The Annual Report shall be prepared in language easily understood by the public or layperson with a limited technical background. The Annual Report shall be a public document.

Task 1.5.1 Annual Report Outline

The Contractor shall:

- Prepare and submit a draft outline of the Annual Report for review and approval. The CCM will provide written comments to the Contractor on the draft outline. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the final outline of the Annual Report, incorporating CCM comments.

Deliverables:

- Draft Outline of the Annual Report
- Final Outline of the Annual Report

Task 1.5.2 Annual Report

The Contractor shall:

- Prepare the draft Annual Report for this Agreement in accordance with the approved outline.
- Submit the draft Annual Report for review and comment. The CCM will provide written comments to the Contractor. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the Annual Report, incorporating CCM comments.

Deliverables:

- Draft Annual Report
- Annual Report

Task 1.6 Final Report

The goal of this task is to prepare a comprehensive written Final Report that describes the original purpose, approach, results and conclusions of the work completed under this Agreement. The Final Report shall be prepared in language easily understood by the public or layperson with a limited technical background.

The Final Report must be completed before the termination date of the Agreement in accordance with the Schedule of Deliverables.

The Final Report shall be a public document. If the Contractor has obtained confidential status from the Energy Commission and will be preparing both a public and a confidential version of the Final Report, the Contractor shall perform the following subtasks for both the public and confidential versions of the Final Report.

Task 1.6.1 Final Report Outline

The Contractor shall:

- Prepare and submit a draft outline of the Final Report for review and approval. The CCM will provide written comments to the Contractor on the draft outline. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.

- Prepare and submit the final outline of the Final Report, incorporating CCM comments.

Deliverables:

- Draft Outline of the Final Report
- Final Outline of the Final Report

Task 1.6.2 Final Report

The Contractor shall:

- Prepare the draft Final Report for this Agreement in accordance with the approved outline.
- Submit the draft Final Report for review and comment. The CCM will provide written comments to the Contractor. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the Final Report, incorporating CCM comments.

Deliverables:

- Draft Final Report
- Final Report

Task 1.7 Prepare and Manage Work Authorizations

The Contractor shall:

- Assist the CCM in drafting WAs in accordance with the Work Authorization provision in Exhibit E of this Agreement.
- Manage WAs executed under this Agreement.

Deliverables:

- Draft Work Authorizations

TASK 2 – MARKET RESEARCH AND ANALYSIS

The goal of this task is to conduct market research and analysis to provide the Energy Commission with relevant and current information to guide in the development of the Outreach and Marketing Plan in Task 3.

The Contractor shall:

- Provide the CCM expertise and support in the development and implementation of outreach and marketing research.
- Submit a Market Research Plan for CCM approval, which describes the recommended research approach to be taken, the audience and regional focus, the market elements to be included or tested, the information sought, and how that information will be used to inform the development of the outreach and marketing plan.

The Market Research Plan must demonstrate how the recommended research approach and techniques will inform campaign development and enhance campaign effectiveness and shall include but not be limited to:

- The target audience's level of awareness of the available alternative fuels and vehicle options.

- The information the target audience needs to know before they can recommend or purchase alternative transportation options.
- The most effective marketing strategies and messaging to increase their awareness and inform their transportation purchase decision.
- Identification of key stakeholders and specific target audiences.

The research plan must include a detailed budget and schedule of deliverables to inform the development of further work authorizations for Task 2.

- Conduct market research and analysis, using a combination of industry recognized market research methods, to determine level of awareness, identify the information required to inform decision making, motivational factors, and effective outreach and marketing approaches. Research approaches may include:
 - Surveys (in-person, telephone, mail, online)
 - Focus Groups
 - Internet strategic intelligence
 - Advertising Research
 - Brand name testing
 - Concept testing
 - Copy testing
 - Buyer decision processes research
 - Other industry recognized research techniques
- Submit a Market Research Report representing the research conducted, research findings, analysis, and recommendations. The report shall also represent findings related to:
 - The target audience's level of awareness of the available alternative fuels and vehicle options.
 - The information the target audience needs to know before they can recommend or purchase alternative transportation options.
 - The most effective marketing strategies and messaging to increase their awareness and inform their transportation purchase decision.
 - The type of advertising research to be used to track and measure the efficacy of the Outreach and Marketing Plan to clearly and effectively communicate the message and motivate the target audience to adopt alternative fuels and/or vehicles.

TASK 3 – OUTREACH AND MARKETING PLAN

The goal of this task is to develop an Outreach and Marketing Plan to meet the outreach and marketing needs of the Program, and to periodically revise the Outreach and Marketing Plan to remain consistent with the funding priorities and goals established in the annual update to the Program investment plan.

The Program's outreach and marketing campaign must serve to familiarize commercial and public fleet owners/managers and independent vehicle operators with the currently available alternative fuels and advanced vehicle technologies, their optimum duty cycle, the benefits of adopting these new technologies, and the resources available to help remove or reduce barriers to adoption of alternative fuels and vehicles.

Task 3.1 General Campaign

The goal of this task is to develop a General Campaign, which will consist of the broader Program branding, messages, outreach activities, and marketing media.

The General Campaign plan must demonstrate the approach, deliverables, and activities to be implemented in Task 4 to develop and disseminate information and resources specific to multiple alternative fuels and vehicles, audiences, regions, partners, and stakeholder groups, consistent with the priorities identified in the annual update to the Program investment plan.

The Contractor shall:

- Provide expertise, support, and recommendations in the preparation of a comprehensive Outreach and Marketing Plan for the Program.
- Prepare and submit a draft General Campaign Outreach and Marketing Plan using the plan submitted with your proposal as a starting point and incorporating the findings and recommendations resulting from the market research and analysis completed in Task 2.

The Contractor shall provide expertise, support, and recommendations to inform development of the General Campaign Plan, which shall include but not be limited to:

- Brand, messaging, and media advertising development
- Development of clear, concise, and benefit-rich messages applicable to specific alternative fuels and vehicles
- Media production and photography
- Advertising placement analysis, planning, and recommendations
- Leveraged advertising buys and pro-bono exposures
- Expertise in the development of design and messaging of event materials and equipment and planning for future outreach opportunities (conferences, working groups, etc.)
- Program website content recommendations and development support
- Recommendations, expertise and support in planning Program announcements, such as funding opportunities, critical launches, project successes, etc.
- Develop methodology to track and evaluate campaign outcomes and adjust the marketing plan to increase target audience exposures

The General Campaign Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.

- Prepare and submit a final General Campaign Plan, incorporating comments from the CCM.
- Prepare and submit an annual refinement of the General Campaign Outreach and Marketing Plan to maintain consistency with the goals of new and updated investment plans and to accommodate opportunities with new fuels, technologies, opportunities, and partners.

Task 3.2 Regional Marketing Campaigns

The goal of this subtask is to create multiple regional outreach and marketing plans based on the input obtained through regional outreach collaboration meetings, information collected in Task 2, and elements of the General Campaign developed in Task 3.1.

The Energy Commission is committed to coordinating the development and implementation of regional and alternative fuel focused efforts with the Program's active partners and stakeholders, which may include but not be limited to:

- Clean Cities Coalitions
- Air Districts
- Non-profit alternative fuel and advanced vehicle collaborative

Therefore, within the limits of available funding, it is expected that portions of the program outreach and marketing resources and effort will be dedicated to regionally focused campaigns. The regional campaigns will be crafted in partnership with regional stakeholders to leverage regionally-funded activities and to ensure support of key regional outreach efforts related to alternative fuels and advanced vehicle technologies.

The Contractor shall:

- Provide the CCM expertise, support, and recommendations to inform development of multiple regionally focused and coordinated outreach and marketing plans.
- Coordinate regional planning meetings to gather information on opportunities to leverage the Program's outreach and marketing efforts with regional efforts and resources. Regional planning meetings activities shall include but not be limited to:
 - Identify and recommend regions for development of outreach and marketing
 - Identify key stakeholders and specific target audiences in each region
 - Plan and facilitate regional planning meeting(s) logistics
 - Prepare a draft agenda, talking points and meeting informational materials
 - Prepare a summary of each meeting and recommendations from stakeholders
- Develop draft Regional Outreach and Marketing Plans for CCM approval for each approved regional campaign.
 - Each regional plan shall be focused on the alternative fuel(s) and/or vehicle technology that have been adopted by the region.
 - Each regionally focused outreach and marketing plan shall be informed by regional partners through the regional planning meetings and be consistent with the Program Investment Plan.
 - Each regionally focused outreach and marketing plan may include, but is not limited to, the following activities and deliverables:
 - Align regional Outreach and Marketing Plans with the general outreach and marketing campaign, inclusive of Program brand, messaging, deliverables, services, costs, and schedule
 - Research and develop media buys, earned media, pro-bono exposures
 - Develop regionally focused fuel and technology message and materials
 - Develop regionally focused marketing to increase industry awareness of program workforce development and training resources
 - Coordinate media production and still photography
 - Develop Program webpage content recommendations
 - Work with Program awardees/grantees located in a given region to jointly develop public opportunities for project outreach and public education
 - Each Regional Outreach and Marketing Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.
- Prepare and submit final Regional Outreach and Marketing Plans for CCM approval, which shall include all CCM comments and edits from the draft.

Task 3.3 Media Development and Procurement

The goal of this task is to develop various media tools for use as a part of the general campaign, as well as the regional campaigns, to increase target audience awareness and adoption of alternative fuels and advanced vehicle technologies.

The Contractor shall:

- Provide the CCM expertise, recommendations, and support in the development of various media tools for use in both the general and regional campaigns. Media

development shall incorporate information obtained and work developed in Tasks 2 and 3 and include, but is not limited to the following:

- Advertising - media planning and production
 - Strategic media placement and purchasing (cable, network, radio, print)
 - Program webpage content development
 - Creative support for Program events and projects
 - Event planning, coordination, and support
 - Develop multi-media campaign to connect fleets and independent operators with information about alternative fuels and advanced vehicle technologies
 - Develop or solicit articles and opinion/editorials for stakeholder and industry newsletters and publications
 - Coordinate editorial boards and secure strategically placed public service announcements
 - Develop and produce press and speaker kits
 - Identify and apply advertising navigational and evaluative metrics to measure campaign effectiveness and guide refinements to improve effectiveness
 - Campaign results evaluation and recommended refinement
 - Develop methodology to track and evaluate campaign outcomes and adjust the marketing plan to increase target audience exposures
- Work in coordination with the CCM to develop these media tools
 - Develop and submit draft Media Development and Procurement Plans for CCM approval. Each Media Plan must include but is not limited to:
 - Specific media elements recommended for implementation
 - Types of media to be utilized
 - Messaging, graphics, and creatives to be used
 - Regions, audiences, and fuels/vehicles to be to be addressed
 - Events and activities

Each Media Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.

- Prepare and submit final Media Development and Procurement Plans for CCM approval, which shall include all CCM comments and edits from the draft.

TASK 4 - OUTREACH AND MARKETING PLANNING MEETINGS

The goal of this task is to manage planning and implementation of the Outreach and Marketing Plan through strategic planning meetings that are regularly scheduled and held on an as-needed basis.

The purpose of the Outreach and Marketing Planning meetings will be to plan and coordinate upcoming deliverables, identify outreach opportunities, identify partnerships, develop outreach activities and partner development marketing campaigns and media buys, to assess the effectiveness of activities, and to conduct long range planning.

Planning meetings will predominately be held at the Energy Commission's office in Sacramento or via conference call.

The Contractor shall:

- Participate in strategic planning with the CCM to maximize results and conserve resources.

- Provide expertise, support, and recommendations in outreach and marketing planning, which shall include, but will not be limited to:
 - Identification of outreach opportunities
 - The best approach to take in the development of outreach activities and partnerships
 - Development of marketing campaigns and media buys
 - How to track and assess the effectiveness of activities and approaches used
 - Long range planning to identify and develop future opportunities and or partnerships.
- Develop a meeting schedule representing the term of the contract for CCM approval.
- Prepare meeting agendas, in coordination with the CCM, for each meeting and distribute the agendas one week prior to each meeting.
- Capture and report understandings, agreements, deliverables, and timelines resulting from each meeting. The meeting report shall be submitted to the CCM within seven working days of the meeting date.

TASK 5 – IMPLEMENT OUTREACH AND MARKETING PLANS

The goal of this task is to implement the Outreach and Marketing Plans informed by research conducted in Task 2 and prepared in Tasks 3 and 4.

The Contractor shall:

- Provide the CCM expertise, recommendations, and support in the implementation of the Outreach and Marketing Campaigns.
- Implement the Outreach and Marketing Plan, including the:
 - General Campaign
 - Regional Campaign(s)
 - Media Development and Procurement

TASK 6- OUTREACH OUTCOMES TRACKING AND ANALYSIS

The goal of this task is to track, measure, and analyze the effectiveness of the Outreach and Marketing Plan in advancing the Program goals and meeting the goals of the agreement. This post-launch evaluation will be utilized to plan future outreach activities and marketing campaigns by identifying the approach that is the most effective in reaching and informing the target audience.

The Contractor shall:

- Utilizing the methodology identified and approved in Task 3, continuously track, measure, and evaluate the effectiveness of the Outreach and Marketing Plan and recommend refinements to ensure that the plan meets the outreach and marketing goals and aligns with the goals of the Program.
- Develop a format, for CCM approval, to report the campaign effectiveness, evaluation, and recommended refinements.
- Provide outreach and marketing tracking and analysis briefings upon CCM request and following key events and media launches.
- Prepare and submit a draft quarterly Outreach and Marketing Measures of Success and Evaluation Report for CCM approval. The Report shall address:
 - Outcome metrics and effectiveness analysis
 - Recommended refinements to the campaign to increase effectiveness

- Prepare and submit a final Measures of Success and Evaluation Report, incorporating comments from the CCM.
- Develop and implement approved refinements methodology.
- Include campaign results and refinements in annual and final reports.

III. Proposal Format, Required Documents, and Delivery

ABOUT THIS SECTION

This section contains the format requirements and instructions on how to submit a proposal. The format is prescribed to assist the Bidder in meeting State bidding requirements and to enable the Commission to evaluate each proposal uniformly and fairly. Bidders must follow all Proposal format instructions, answer all questions, and supply all requested data.

REQUIRED FORMAT FOR A PROPOSAL

All proposals submitted under this RFP must be typed or printed using a standard 11-point font, singled-spaced and a blank line between paragraphs. Pages must be numbered and sections titled and printed back-to-back. Spiral or comb binding is preferred and tabs are encouraged. Binders are discouraged.

NUMBER OF COPIES

Bidders must submit the original and four copies of the proposal (Sections 1 and 2). Bidders must also submit electronic files of the proposal on [CD-ROM or USB memory stick](#) along with the paper submittal. Two CD-ROMs or USB memory sticks are needed. Electronic files must be in Microsoft Word XP (.doc format) and Excel Office Suite formats. Completed Budget Forms, Attachment 7, must be in Excel format. Electronic files submitted via e-mail will not be accepted.

PACKAGING AND LABELING

The original and copies of the proposal must be labeled "Request for Proposal 600-11-601," and include the title of the proposal and the appropriate section number.

Include the following label information and deliver your proposal, in a sealed package:

Person's Name, Phone #
Bidder's Name
Street Address
City, State, Zip Code
FAX #

RFP 600-11-601
Contracts Office, MS-18
California Energy Commission
1516 Ninth Street, 1st Floor
Sacramento, California 95814

PREFERRED METHOD FOR DELIVERY

A Bidder may deliver a proposal by:

- U. S. Mail
- Personally
- Courier service

Proposals must be delivered **no later than 3:00 p.m.**, to the Commission Contracts Office during normal business hours and prior to the date and time specified in this RFP. In accordance with Public Contract Code 10344, proposals received after the specified date and time are considered late and will not be accepted. There are no exceptions to this law. Postmark dates of mailing, E-mail and facsimile (FAX) transmissions are not acceptable in whole or in part, under any circumstances.

ORGANIZE YOUR PROPOSAL AS FOLLOWS

SECTION 1, Administrative Response

Cover Letter

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Contractor Status Form

Darfur Contracting Act Form

Small Business Certification

Completed Disabled Veteran Business Enterprise form

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Bidder Certification of Minimum Qualifications

Attachment 1

Attachment 2

If applicable

Attachment 3.3

Attachment 3.4

Attachment 4

If applicable

Attachment 8

SECTION 2, Technical and Cost Proposal

Proposal Narrative (Limited to 10 Pages)

See A below

Proposed Outreach and Marketing Plan (Limited to 10 Pages)

See B below

Proposed Research Plan (Limited to 5 Pages)

See C below

Bidder's and Principal's Relevant Experiences & Qualifications

See D below

Bidder's Project Team Organizational Structure (Limited to 5 Pages)

See E below

Examples and Narratives of Previous Work Products (Narrative Limited to 2 Pages)

See F below

Client Reference Letters (Limited to 2 Pages per letter)

See G below

Budget Forms

Attachment 7. See also H below.

A. Proposal Narrative (Limited to 10 pages)

The narrative portion of the proposal shall include an Executive Summary and a description of the Bidder's approach to providing services listed in the Scope of Work, highlighting any outstanding features, qualifications, and experience.

The narrative shall also provide a description of the Proposed Outreach and Marketing Plan, the industry recognized market research methods the Bidder would apply to inform development of the plan, and the metrics and methodology the Bidder would employ to measure the success of the plan.

B. Proposed Outreach and Marketing Plan (Limited to 10 Pages)

Provide a detailed proposed Outreach and Marketing Plan, which represents the Bidder's approach and expert recommendations on the specific techniques and activities to be employed in the development and implementation of the Program Outreach and Marketing Campaign.

- The Outreach and Marketing Plan must be research based, measureable, and responsive to the program information provided throughout the RFP.
- The Outreach and Marketing Plan must address, incorporate and expand upon the outreach and marketing goals and elements described in the RFP.
- The Outreach and Marketing Plan must include estimated timelines and estimated cost per activity or task.

C. Proposed Research Plan (Limited to 5 Pages)

Provide a detailed proposed Market Research Plan, which represents the Bidder's approach and expert recommendations on the specific techniques and activities to be employed to inform the development of the outreach and marketing plan and enhance campaign effectiveness. The research plan must include an estimated cost per research activity and estimated timelines.

D. Bidder's and Principals' Relevant Experience and Qualifications

1. Describe recently completed work as it relates to this Scope of Work.
2. Provide a current resume (no more than 2 pages each) for all team members (including subcontractors) listed, including job classification and description, relevant experience, education, academic degrees and professional licenses relevant to the outreach and marketing effort.
3. Describe professional awards received in outreach and marketing.

E. Bidder's Project Team Organizational Structure (Limited to 5 pages)

Provide an organizational chart and description of the project team, which shall include:

1. A short description of each firm and key member to deliver services on this project.
2. A description of the tasks to be performed by subcontractors and the relationship between the Contractor and subcontractors.
3. A description of the project team's qualifications as they apply to performing the activities described in the proposed Outreach and Marketing Plan and the tasks in the Scope of Work.
4. The title or classification of each person and their level of effort (percentage of time) for each proposed Outreach and Marketing Plan activity each proposed research plan activity and for each Scope of Work task, including subcontractors.

F. Examples and Narratives of Previous Work Products (Limited to 2 pages per narrative)

Provide a minimum of two examples of prior outreach and marketing campaigns that the Bidder developed and implemented for government programs. Each example shall include:

1. A narrative of the prior campaign that describes the program served, the program's outreach and marketing goals, the overall campaign (approaches, activities, and research), and the measureable results.
2. Sample campaign marketing materials, messages, media pieces.

3. Descriptions and samples of the metrics and methodologies used to measure and report campaign results.
4. Professional awards (if any) related to the campaign.

Samples of marketing materials, advertising messages, media pieces, and results tracking methodology must be provided in electronic format (flash drive, CD, or DVD) with one hard copy of the creative samples.

G. Client Reference Letters (Limited to 2 pages per letter)

Provide three letters of reference from previous clients, (within the last five years) with at least two being from a government agency, that required outreach and marketing services for a program of similar complexity (multiple market audiences, regions, technologies, messages).

The letters of reference must be received on company or agency letterhead, provide a brief description of the services provided, and represent the client's level of satisfaction with outcomes related to the following:

- Cost efficiency/effectiveness
- Creativity demonstrated
- Level of Bidder's responsiveness and flexibility
- Campaign results
- Likelihood they would contract with the Bidder again.
- Contact information for follow up reference check

H. Budget Forms

Prime Labor Rates	Attachment 7, Attachment B-1
Labor Rates for each Subcontractor	Attachment 7, Attachment B-1a-z
Prime Non-Labor Rates	Attachment 7, Attachment B-2
Non-Labor Rates for each Subcontractor	Attachment 7, Attachment B-2a-z
Loaded Hourly Rate Calculation	Attachment 7, Attachment B-3

The Bidder must submit information on **all** of the attached budget forms, B-1 through B-3, and this will be deemed the equivalent of a formal Cost Proposal.

Detailed instructions for completing these forms are included at the beginning of Attachment 7.

Rates and personnel shown must reflect rates and personnel you would charge if you were chosen as the Contractor for this RFP. The salaries, rates, and other costs entered on these forms become a part of the final agreement. The entire term of the agreement and projected rate increases must be considered when preparing the budget. The rates bid are considered capped and shall not change during the term of the contract. The Contractor shall only be reimbursed for their **actual** rates up to these rate caps. The hourly rates provided in all B-1s shall be unloaded (before fringe benefits, overheads, general & administrative (G&A) or profit).

All budget forms are required because they will be used for the contract prepared with the winning Bidder.

NOTE: The information provided in these forms will **not** be kept confidential.

Attachment B-3: Loaded Hourly Rate Calculation

This attachment will be used for the purposes of calculating the average hourly rate score under cost criterion 1, located in the Evaluation Criteria Worksheet. The loaded hourly rate is defined as direct labor, fringe benefits, non-labor rates (overhead, general and administrative, etc., as applicable), and profit (if applicable).

1. Use one form for the Bidder (Prime Contractor) and one for each subcontractor. Insert your company or organization name at the top of the form.
2. For each staff person from this company or organization that will be directly billed to this Agreement:
 - Provide the job classifications or title.
 - Insert the unloaded hourly rates in the direct labor column. You must use the rates provided on Forms B-1 and B-2 for your company or organization when calculating the loaded hourly rates. Follow the instructions on the form, Attachment B-3, Loaded Hourly Rate Calculation, in budget workbook.

IV. Evaluation Process and Criteria

ABOUT THIS SECTION

This section explains how the proposals will be evaluated. It describes the evaluation stages, preference points, and scoring of all proposals.

PROPOSAL EVALUATION

A Bidder's proposal will be evaluated and scored based on their response to the information requested in this RFP. The entire evaluation process from receipt of proposals to posting of the Notice of Proposed Award is confidential.

To evaluate all Proposals, the Energy Commission will organize an Evaluation Committee. The Evaluation Committee may consist of Energy Commission staff or staff of other California state entities.

The Proposals will be evaluated in two stages:

Stage One: Administrative and Completeness Screening

The Contracts Office will review Proposals for compliance with administrative requirements and completeness. Proposals that fail Stage One shall be disqualified and eliminated from further evaluation.

Stage Two: Technical and Cost Evaluation of Proposals

Proposals passing Stage One will be submitted to the Evaluation Committee to review and score based on the Evaluation Criteria in this solicitation.

The total score for each Proposal will be the average of the combined scores of all Evaluation Committee members.

After scoring is completed, Proposals not attaining a score of 70 percent of the total possible points will be eliminated from further competition.

All applicable Preferences will be applied to all Proposals attaining a minimum of 70 percent of the total possible points. The agreement shall be awarded to the responsible Bidder meeting the requirements outlined above, who achieves the highest score after application of Preferences.

SCORING SCALE

Using this Scoring Scale, the Evaluation Committee will give a score for each criterion described in the Evaluation Criteria Worksheet.

% of Possible Points	Interpretation	Explanation for Percentage Points
0%	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
25%	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
50%	Inadequate	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
70%	Adequate	Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
80%	Good	Response fully addresses the requirements being scored with a good degree of confidence in the Bidder's response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable.
90%	Excellent	Response fully addresses the requirements being scored with a high degree of confidence in the Bidder's response or proposed solution. Bidder offers one or more enhancing features, methods or approaches exceeding basic expectations.
100%	Exceptional	All requirements are addressed with the highest degree of confidence in the Bidder's response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.

PREFERENCE POINTS

A Bidder may qualify for non-technical preference points described below. Each qualifying Bidder passing the minimum technical evaluation will receive the applicable preference points.

Disabled Veteran Business Enterprise Incentive

The DVBE Incentive program was established pursuant to Military & Veterans Code Section 999.5(2) and Department of General Services' Regulations 2 CCR 1896.98 et.seq. The information in Attachment 3.1 explains how the incentive is applied and how much of an incentive will be given.

Small / Microbusiness

Bidders who qualify as a State of California certified small business will receive five percent (5%) preference points based on the highest responsible bidder's total score, if the highest scored proposal is submitted by a business other than a certified small business. Bidders qualifying for this preference must submit a copy of their Small Business Certification and document their status in Attachment 1, Contractor Status Form.

Non-Small Business

The preference to a non-small business bidder that commits to small business or micro-business subcontractor participation of twenty-five percent (25%) of its net bid price shall be five percent (5%) of the highest responsive, responsible bidder's total score (RFP secondary). A non-small business, which qualifies for this preference, may not take an award away from a certified small business. Bidders qualifying for this preference must document the small business status of all subcontractors on Attachment 3.4 and submit all applicable Small Business Certifications.

Target Area Contract Preference Act/ Enterprise Zone Act/ Local Agency Military Base Recovery Act

The following preferences will be granted for this solicitation. Bidders wishing to take advantage of these preferences will need to review the websites stated below and submit the appropriate response with their Bid.

Target Area Contract Preference Act (TACPA)

The Target Area Contract Preference Act (Government Code Section 4530 et seq.) provides five percent (5%) preference points to California-based companies that perform state contract work in a distressed area. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/tacpaprocedure.pdf> to determine if they qualify for this preference.

Enterprise Zone Act (EZA)

The Enterprise Zone Act (Government Code Section 7070, et seq.) provides preference points as an incentive for business and job development in distressed and declining areas of the State. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/ezaprocedure.pdf> to determine if they qualify for this incentive.

Local Agency Military Base Recovery Act (LAMBRA)

The Local Agency Military Base Recovery Act (Government Code Section 7118, et seq.) provides five percent (5%) preference points to California-based companies that perform State contract work in the LAMBRA. Bidders should review the information located at <http://www.documents.dgs.ca.gov/pd/poliproc/lambraprocedure.pdf> to determine if they qualify for this preference.

The TACPA, EZA, and LAMBRA preferences only apply to California based firms that demonstrate and certify under penalty of perjury that at least 50% of the total labor hours for manufactured goods or 90% of the total labor hours for services will be performed in distressed areas. The maximum preference that can be given for any bid may not exceed 9% up to \$50,000.00.

Bidders wishing to take advantage of these preferences are required to submit the following applications/forms available on the above websites with their Bid:

- TACPA (Std. 830) and/or EZA (Std. 831) and or LAMBRA (Std. 832)
- Bidder's Summary of Contract Activities and Labor Hours (DGS/PD 526)

If you have further questions or need additional information on this matter, please contact TACPA/EZA/LAMBRA Preference Program Group at (916) 375-4609.

NOTICE OF PROPOSED AWARD

The Commission will post a Notice of Proposed Award (NOPA) at the Commission's headquarters in Sacramento, on the Commission's Web Site, and will mail the NOPA to all parties that submitted a proposal.

MINIMUM QUALIFICATIONS

By signing the Bidder Certification of Minimum Qualifications, Attachment 8, Bidder will certify all of the qualifications below.

1. The Bidder must be a full-service social marketing and advertising agency with the ability, resources, and experience to develop and execute a comprehensive research-based outreach and marketing campaign.
2. The Bidder must have an office in the State of California and the project manager must be based in the State of California.
3. The Bidder must have a minimum of ten years experience in providing outreach and marketing services.
4. The Bidder must have a minimum of five years experience in providing outreach and marketing services related to a government program.
5. The Bidder must have a minimum of ten years experience in the production and deployment of creative products, including but not limited to, television, cable, radio, and print ads.

EVALUATION CRITERIA WORKSHEET

Technical Evaluation Criteria	Possible Points
<p>General Approach to the Scope of Work</p> <p>The proposal demonstrates the Bidder's experience, capability, and prior success in implementing and measuring a strategic outreach and marketing campaign.</p> <p>The highlighted features, qualifications and experience are relevant to the Program and responsive to the Scope of Work:</p> <p>The response to the Scope of Work demonstrates:</p> <ul style="list-style-type: none"> ✓ Completeness and thoroughness of the Bidder's approach (addresses all of the tasks defined) ✓ Understanding of the Program goals, target audience(s), topics to be addressed and marketing needs ✓ Understanding of the target audience(s) and potential regional partners ✓ Innovative and flexible approaches to accommodate potentially short notification opportunities and tight deadlines ✓ Sound approach that will result in a research-based, effective and replicable campaign <p>The proposal demonstrates the Bidder's ability to carry out the tasks:</p> <ul style="list-style-type: none"> ✓ Experience and success in conducting outreach and marketing for similar programs ✓ Use of staff and/or subcontractors with appropriate and relevant experience for the tasks ✓ Appropriate management and coordination strategies with Contractor's personnel and with subcontractors articulated ✓ Staffing plan sufficient for timely deliverables ✓ Bidder demonstrates sufficient resources being devoted to the project and each individual task 	<p>12</p>

<p>OUTREACH AND MARKETING RESEARCH PLAN AND ANALYSIS</p> <p>The proposed approach to outreach and marketing research and analysis demonstrates:</p> <ul style="list-style-type: none"> ✓ Experience and success in conducting outreach and marketing research for similar programs ✓ Experience in conducting market research and analysis, using a combination of industry recognized market research methods, to determine level of awareness, identify the information required to inform decision making, motivational factors, and effective outreach and marketing approaches. <p>The proposed Research Plan shows the Bidder's ability to:</p> <ul style="list-style-type: none"> ✓ Design and conduct appropriate surveys and focus groups in a cost effective manner ✓ Understand the target audiences, information needs and motivational factors ✓ Develop effective research survey questions ✓ Provide valuable insight into customer attitudes and uncover issues and barriers related to new product adoption ✓ Test customer response to messaging and products, and identify information or awareness gaps ✓ Communicate technical information in a clear and understandable manner ✓ Identify appropriate medium to reach target audience and effect change ✓ Measure and evaluate the campaign's effectiveness in reaching the target audience and stimulating measureable market impact 	<p>10</p>
<p>OUTREACH AND MARKETING PLAN AND TIMELINE</p> <p>The proposed Outreach and Marketing Plan:</p> <ul style="list-style-type: none"> ✓ Is research based, measureable, and responsive to the program information provided throughout the RFP ✓ Is responsive to the overall goals detailed in the scope of work and is consistent with the most recently approved Investment Plan update ✓ Demonstrates an understanding of the Program's mission, goals, markets, audiences, messages, and outreach and marketing goals ✓ Addresses each of the required elements in the Scope of Work and demonstrates a high degree of expertise and competency in the field of outreach and marketing ✓ Approach and activities demonstrate creativity, originality, and cost efficiency ✓ Timeline and budget attributed to each activity are reasonable 	<p>10</p>

<p>OUTREACH AND MARKETING TRACKING AND ANALYSIS</p> <p>Demonstrates experience and competence in:</p> <ul style="list-style-type: none"> ✓ Techniques to monitor, verify and evaluate outreach and marketing campaign effectiveness ✓ Developing campaign refinement plans to improve campaign effectiveness ✓ Designing research projects to assess market transformation ✓ Designing surveys ✓ Summarizing complex information into categories ✓ Modeling techniques <p>Demonstrates experience and ability to:</p> <ul style="list-style-type: none"> ✓ Identify relevant performance indicators ✓ Prepare high quality, technically sound and well documented recommendations and reports ✓ Determine information needs ✓ Summarize complex information ✓ Choose data display formats ✓ Prepare graphics, pictures, and other visually appealing materials ✓ Communicate information in readable, clear, accessible, and attractive manner 	<p>10</p>
<p>TEAM EXPERIENCE</p> <p>The descriptions of each key team member (including subcontractors) and the tasks each member will perform are relevant and responsive to Program outreach and marketing needs and goals as described in the RFP.</p> <p>Team member qualifications and experience are relevant to outreach and marketing for similar programs and demonstrate:</p> <ul style="list-style-type: none"> ✓ Accomplishments of assigned personnel on past similar projects ✓ Assigned personnel have working knowledge of applicable California state and/or federal energy and/or fuels policy ✓ Assigned personnel have experience with California contract management policies, procedures and requirements ✓ Key personnel have a track record of administering a contract to control costs, maintain schedules, provide quality control of deliverables produced by the team and communicate effectively 	<p>7</p>
<p>CLIENT REFERENCES</p> <p>The degree to which prior customers were satisfied with the services provided based on:</p> <ul style="list-style-type: none"> ✓ Cost efficiency/effectiveness ✓ Creativity demonstrated ✓ Level of Bidder's responsiveness and flexibility ✓ Campaign results ✓ Likelihood they would contract with the Bidder again. 	<p>8</p>

PRIOR CAMPAIGN EXAMPLES The narrative and sample materials demonstrate: <ul style="list-style-type: none"> ✓ The Bidder's experience, capability, and prior success in implementing and measuring a research based comprehensive outreach and marketing campaign ✓ The Bidder's experience in implementing effective ad placement strategies that secured pro-bono exposures ✓ The effectiveness of the campaign ✓ The depth of research conducted to identify target audience, messaging, and overall approach ✓ The creativity demonstrated in approach, methods, and materials ✓ The cost efficiency strategies employed in developing and implementing the campaign ✓ Effectiveness of procedures to evaluate and refine campaign 	8
COST CRITERION	
1. Average Loaded Hourly Rate (Cost Points). The Score for this criteria will be derived from the mathematical cost formula set forth below, which compares the cumulative average loaded hourly rate of all loaded hourly rates listed in the subject Bidder's Cost Bid, with the cumulative average loaded hourly rate of all loaded hourly rates listed in the Lowest Bidder's cost bid .	30
2. Cost Justification. Bidder has justified all proposed personnel identified in its bid for all technical areas and functions to be performed by Prime and Team Members.	5
TOTAL POSSIBLE POINTS	100
Minimum Passing Score (70%)	
Disabled Veteran Business Enterprise Incentive	
Small/Micro Business Preference	
Non-Small Business Preference	
TACPA/EZA/LAMBRA Preference	
BIDDER'S FINAL SCORE	

The method for evaluating the average loaded hourly rate is the formula below:

i. Cost Formula for calculation of average loaded hourly rate score (criterion 1 above)

“**Lowest Bidder**” is defined as the Bidder with the lowest cumulative average loaded hourly rate for all prime contractor and all subcontractor personnel.

For example (using the following arbitrary hourly rates and fictional cost bids):

Bidder 1

Prime Contractor

Project Manager: \$100/hr

Subcontractor A

Engineer I: \$90/hr

Subcontractor B

Engineer IV: \$120/hr

Engineer II: \$100/hr

Engineer III: \$110/hr

Bidder 1's cumulative average loaded hourly rate = $100 + 90 + 100 + 110 + 120$ divided by 5 = **\$104**

Bidder 2

Prime Contractor

Project Manager: \$100/hr

Engineer II: \$110/hr

Engineer III: \$120/hr

Subcontractor A

Engineer I: \$100/hr

Subcontractor B

Engineer IV: \$130/hr

Bidder 2's cumulative average loaded hourly rate = $100 + 100 + 110 + 120 + 130$ divided by 5 = **\$112**

Bidder 3

Prime Contractor

Project Manager: \$110/hr

Engineer II: \$120/hr

Engineer III: \$130/hr

Subcontractor A

Engineer I: \$110/hr

Subcontractor B

Engineer IV: \$140/hr

Bidder 3's cumulative average loaded hourly rate = $110 + 110 + 120 + 130 + 140$ divided by 5 = **\$122**

In the examples above, Bidder 1 would be the Lowest Bidder.

ii. The Cost Formula for calculating the Points Awarded for criterion 1 above is as follows:

a. Calculate Cumulative Average Loaded Hourly Rate

For each Bidder, we calculate the average rate, by adding all rates, and dividing by the number of rates:

Sum of all rates divided by Number of Rates Given = Average Loaded Hourly Rate for each Bidder: \$_____

b. Create Percentage

Then we compare rates of all the Bidders, by creating a percentage of the Bidder's rate, compared to the lowest Bidder's rate. The lowest Bidder will have the highest percentage of points:

(Lowest Bidder's Cumulative Average Loaded Hourly Rate divided by Bidder's Cumulative Average Loaded Hourly Rate) = Bidder's Percentage of Points

c. Apply Possible Points

Finally, we multiply the Bidder's Percentage of Points by the number of possible points:

Bidder's Percentage of Points X Possible Points = Points Awarded

Following is an example of Cost Score Calculation, using the above examples:

Cumulative Average Hourly Rates: Bidder #1 = \$104, Bidder #2 = \$112, Bidder #3=\$122

Bidder #1			Bidder #2			Bidder #3		
104 divided by 104 = 100%			104 divided by 112 = 93%			104 divided by 122 = 85%		
Possible Points	Percentage of Points	Points Awarded	Possible Points	Percentage of Points	Points Awarded	Possible Points	Percentage of Points	Points Awarded
20	100%	20	20	93%	18.6	20	85%	17

iii. Cost Justification

In relation to Cost Criterion **2** above, the bidder shall explain and justify all proposed personnel identified in the Proposal for all technical areas and functions to be performed by the Prime and each of the Subcontractors.

V. Administration

RFP DEFINED

The competitive method used for this procurement of services is a Request for Proposal (RFP). A Proposal submitted in response to this RFP will be scored and ranked based on the Evaluation Criteria. Every Proposal must establish in writing the Bidder's ability to perform the RFP tasks.

DEFINITION OF KEY WORDS

Important definitions for this RFP are presented below:

Word/Term	Definition
State	State of California
DGS	Department of General Services
Energy Commission	California Energy Commission
Program	Alternative and Renewable Fuels and Vehicle Technology Program
RFP	Request for Proposal, this entire document
Proposal	Formal written response to this document from bidder
Bidder	Respondent to this RFP
CCM	Commission Contract Manager
DVBE	Disabled Veteran Business Enterprises
Work Authorization or WA	A Work Authorization-authorizes the Contractor to perform work on specific tasks, and details the Scope of Work, deliverables, costs and budget for each work assignment.

COST OF DEVELOPING PROPOSAL

The Bidder is responsible for the cost of developing a proposal, and this cost cannot be charged to the State.

SOFTWARE APPLICATION DEVELOPMENT

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework (version 3.5 and up) Recommend 4.0
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5
- Visual Studio.NET (version 2008 and up) Recommend 2010
- C# Programming Language with Presentation (UI), Business Object and Data Layers
- SQL (Structured Query Language)
- Microsoft SQL Server 2008, Stored Procedures Recommend 2008 R2

- Microsoft SQL Reporting Services Recommend 2008 R2
- XML (external interfaces)

Any exceptions to the Electronic File Format requirements above must be approved in writing by the Energy Commission Information Technology Services Branch.

PRINTING SERVICES

Per Management Memo 07-06, State Agencies must procure printing services through the Office of State Publishing (OSP) unless the conditions in Government Code section 19130 (a) or (b) are satisfied. Bidders may include printing services in their proposals for this RFP. Printing services, if exempted by OSP, may be authorized through subsequent Work Authorizations.

CONFIDENTIAL INFORMATION

The Commission will not accept or retain any Proposals that are marked confidential in their entirety and Bidders are strongly discouraged from requesting confidential treatment for any of the information contained in a submittal.

DARFUR CONTRACTING ACT OF 2008

Effective January 1, 2009, all solicitations must address the requirements of the Darfur Contracting Act of 2008 (Act). (Public Contract Code sections 10475, *et seq.*; Stats. 2008, Ch. 272). The Act was passed by the California Legislature and signed into law by the Governor to preclude State agencies generally from contracting with “scrutinized” companies that do business in the African nation of Sudan (of which the Darfur region is a part), for the reasons described in Public Contract Code section 10475.

A scrutinized company is a company doing business in Sudan as defined in Public Contract Code section 10476. Scrutinized companies are ineligible to, and cannot, bid on or submit a proposal for a contract with a State agency for goods or services. (Public Contract Code section 10477(a)).

Therefore, Public Contract Code section 10478 (a) requires a company that currently has (or within the previous three years has had) business activities or other operations outside of the United States to certify that it is not a “scrutinized” company when it submits a bid or proposal to a State agency. (See # 1 on Attachment 2)

A scrutinized company may still, however, submit a bid or proposal for a contract with a State agency for goods or services if the company first obtains permission from the Department of General Services (DGS) according to the criteria set forth in Public Contract Code section 10477(b). (See # 2 on Attachment 2)

DISABLED VETERAN BUSINESS ENTERPRISES (DVBE) COMPLIANCE REQUIREMENTS

The Disabled Veteran Business Enterprise (DVBE) Program has two inter-related aspects:

Participation Goals: This RFP is subject to a mandatory participation goal of three percent (3%) certified California Disabled Veteran Business Enterprise (DVBE) as set forth in Public Contract Code Section 10115 *et seq.*

And,

Incentive: The DVBE Incentive Program gives a contractor an opportunity to improve their bid status based on the efforts attained from the DVBE Participation Program.

More information regarding DVBE and Small Business is located in Attachments 3.1 and 3.2.

RFP CANCELLATION AND AMENDMENTS

If it is in the State's best interest, the Energy Commission reserves the right to do any of the following:

- Cancel this RFP;
- Amend this RFP as needed; or
- Reject any or all Proposals received in response to this RFP

If the RFP is amended, the Energy Commission will send an addendum to all parties who requested the RFP and will also post it on the Energy Commission's Web Site www.energy.ca.gov/contracts and Department of General Services' Web Site http://www.bidsync.com/DPX?ac=powersearch&srchoid_override=307818.

ERRORS

If a Bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the Bidder shall immediately notify the Commission of such error in writing and request modification or clarification of the document. Modifications or clarifications will be given by written notice of all parties who requested the RFP, without divulging the source of the request for clarification. The Commission shall not be responsible for failure to correct errors.

MODIFYING OR WITHDRAWAL OF PROPOSAL

A Bidder may, by letter to the Contact Person at the Energy Commission, withdraw or modify a submitted Proposal before the deadline to submit proposals. Proposals cannot be changed after that date and time. A Proposal cannot be "timed" to expire on a specific date. For example, a statement such as the following is non-responsive to the RFP: "This proposal and the cost estimate are valid for 60 days."

IMMATERIAL DEFECT

The Energy Commission may waive any immaterial defect or deviation contained in a Bidder's proposal. The Energy Commission's waiver shall in no way modify the proposal or excuse the successful Bidder from full compliance.

DISPOSITION OF BIDDER'S DOCUMENTS

On the Notice of Proposed Award posting date all proposals and related material submitted in response to this RFP become a part of the property of the State and public record. Bidders who want any work examples they submitted with their proposals returned to them shall make this request and provide either sufficient postage, or a Courier Charge Code to fund the cost of returning the examples.

BIDDERS' ADMONISHMENT

This RFP contains the instructions governing the requirements for a firm quotation to be submitted by interested Bidders, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Bidder responsibilities. Bidders must take the responsibility to carefully read the entire RFP, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, make sure that all procedures and requirements of the RFP are followed and appropriately addressed, and carefully reread the entire RFP before submitting a proposal.

GROUND TO REJECT A PROPOSAL

A Proposal shall be rejected if:

- It is received after the exact time and date set for receipt of Proposal's pursuant to Public Contract Code, Section 10344.
- It is considered non-responsive to the California Disabled Veteran Business Enterprise participation requirements.
- It is lacking a properly executed Certification Clauses.
- It is lacking a properly executed Darfur Contracting Act Form.
- It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Bidder.
- The Proposal is intended to erroneously and fallaciously mislead the State in its evaluation of the Proposal and the attribute, condition, or capability is a requirement of this RFP.
- There is a conflict of interest as contained in Public Contract Code Sections 10410-10412 and/or 10365.5.
- It contains confidential information.
- The Bidder does not agree to the terms and conditions as attached to the solicitation either by not signing the Contractor Status Form or by stating anywhere in the bid that acceptance is based on modifications to those terms and conditions or separate terms and conditions.
- Attachment 8, Bidder Certification of Minimum Qualifications is not completed and signed.

A Proposal may be rejected if:

- It is not prepared in the mandatory format described.
- It is unsigned.
- The firm or individual has submitted multiple proposals for each task.
- It does not literally comply or contains caveats that conflict with the RFP and the variation or deviation is not material, or it is otherwise non-responsive.
- The bidder has previously completed a PIER agreement, received the PIER Royalty Review letter, which the Commission annually sends out to remind past recipients of their obligations to pay royalties, and has not responded to the letter or is otherwise not in compliance with repaying royalties.
- The budget forms are not filled out completely.

PROTEST PROCEDURES

A Bidder may file a protest against the proposed awarding of a contract. Once a protest has been filed, contracts will not be awarded until either the protest is withdrawn, or the Commission cancels the RFP, or the Department of General Services decides the matter.

Please note the following:

- Protests are limited to the grounds contained in the California Public Contract Code Section 10345.

- During the five **working** days that the Notice of Proposed Award (NOPA) is posted, protests must be filed with the DGS Legal Office and the Commission Contracts Office.
- Within five **calendar** days after filing the protest, the protesting Bidder must file with the DGS and the Commission Contracts Office a full and complete written statement specifying the grounds for the protest.
- If the protest is not withdrawn or the solicitation is not canceled, DGS will decide the matter. There may be a formal hearing conducted by a DGS hearing officer or there may be briefs prepared by the Bidder and the Commission for the DGS hearing officer consideration.

AGREEMENT REQUIREMENTS

The content of this RFP shall be incorporated by reference into the final contract. See the sample Agreement terms and conditions included in this RFP.

No Contract Until Signed & Approved

No agreement between the Commission and the successful Bidder is in effect until the contract is signed by the Contractor, approved at a Commission Business Meeting, and approved by the Department of General Services, if required.

Contract Amendment

The contract executed as a result of this RFP will be able to be amended by mutual consent of the Commission and the Contractor. The contract may require amendment as a result of project review, changes and additions, changes in project scope, or availability of funding.